

US 6792399 B1		USPAT	20040914	46	Combination forecasting using clusterization		703/2	705/36; 705/37		Phillips; G. Michael et al.
US 6345261 B1		USPAT	20020205	18	Customer loyalty investment program		705/14	705/35		Feidelson; Robert S. et al.
US 6629081 B1		USPAT	20030930	218	Account settlement and financing in an e-commerce environment		705/30			Cornelius; Richard D. et al.
US 6598028 B1		USPAT	20030722	14	Computer-implemented universal financial management/translation system and method		705/35	705/26; 705/36; 705/37		Sullivan; Lynn et al.
US 6442533 B1		USPAT	20020827	87	Multi-processing financial transaction processing system		705/35	705/30; 705/32; 705/36; 705/37; 705/38		Hinkle; William H.
US 6411939 B1		USPAT	20020625	121	Computer-aided method, machine, and products produced thereby, for illustrating a replacement of a benefit plan that is viable at one location but not viable at the location of the replacement		705/35	705/1; 705/4; 705/7		Parsons; David William
US 6324523 B1		USPAT	20011127	30	Integrated client relationship management processor		705/35	705/36; 705/37; 705/39		Killeen, Jr.; John J. et al.
US 6188992 B1		USPAT	20010213	14	Apparatus, method and system for adaptively managing investments		705/35	705/14; 705/36; 705/37		French; Fredric J.
US 6167384 A		USPAT	20001226		Augmented system and methods for computing to support fractional contingent interests in property		705/35	705/1		Graff; Richard A.
US 6154731 A		USPAT	20001128	39	Computer assisted and/or implemented process and architecture for simulating, determining and/or ranking and/or indexing effective corporate governance using complexity theory and agency-based modeling		705/35	705/36; 705/7		Monks; Robert A. G. et al.
US 6148293 A		USPAT	20001114	48	Method and apparatus of creating a financial instrument and administering an adjustable rate loan system		705/35	705/38		King; Douglas L.
US 6108641 A		USPAT	20000822	25	Integrated nested account financial system with medical savings subaccount		705/35	705/2		Kenna; Janine S. et al.
US 5704045 A		USPAT	19971230	27	System and method of risk transfer and risk diversification including means to assure with assurance		705/35	705/38		King; Douglas L. et al.

					of timely payment and segregation of the interests of capital					
US 6832209 B1		USPAT	20041214	10	Method and apparatus for tax-efficient investment using both long and short positions		705/36	705/37		Karp; Ronald A. et al.
US 6687681 B1		USPAT	20040203		Method and apparatus for tax efficient investment management		705/36	705/37		Schulz; David W. et al.
US 6601044 B1		USPAT	20030729	45	Method and apparatus for enabling individual or smaller investors or others to create and manage a portfolio of securities or other assets or liabilities on a cost effective basis		705/36	705/35; 705/37		Wallman; Steven M. H.
US 6484152 B1		USPAT	20021119	23	Automated portfolio selection system		705/36	705/35; 705/7		Robinson; Herbert W.
US 6484151 B1		USPAT	20021119	24	System and method for selecting and purchasing stocks via a global computer network		705/36	705/38		O'Shaughnessy; James P.
US 6415268 B1		USPAT	20020702	22	Method of recovering the real value of a stock from the stock pricing data		705/36			Korisch; Semmen I.
US 6338047 B1		USPAT	20020108	20	Method and system for investing in a group of investments that are selected based on the aggregated, individual preference of plural investors		705/36			Wallman; Steven M. H.
US 6292788 B1		USPAT	20010918		Methods and investment instruments for performing tax-deferred real estate exchanges		705/36	705/35; 705/37; 705/38		Roberts; Neal et al.
US 6275814 B1		USPAT	20010814	9	Investment portfolio selection system and method		705/36	705/35		Giansante; Joseph E. et al.
US 6192347 B1		USPAT	20010220	198	System and methods for computing to support decomposing property into separately valued components		705/36	705/31; 705/35; 705/38		Graff; Richard A.
US 6092056 A		USPAT	20000718	18	Data processing system and method for financial debt instruments		705/36	705/35; 705/37		Tull, Jr.; Robert Stanley et al.
US 6088685 A		USPAT	20000711	10	Open end mutual fund securitization process		705/36	705/35		Kiron; Kenneth et al.
US 6085174 A		USPAT	20000704	39	Computer assisted and/or implemented process and architecture for administering an investment and/or retirement program		705/36	705/35; 705/37; 705/38		Edelman; Ric

US 6064986 A		USPAT	20000516	58	Computer assisted and/or implemented process and architecture for customer account creation, maintenance and administration for an investment and/or retirement program		705/36	705/35; 705/37; 705/40		Edelman; Fredric M.
US 6064984 A		USPAT	20000516	21	Graphical user interface for a computer-implemented financial planning tool		705/36	345/700; 705/35; 715/502; 715/503		Ferguson; Mark G. H. et al.
US 6041313 A		USPAT	20000321	57	401K user software		705/36			Gilbert; James A. et al.
US 6021397 A		USPAT	20000201	22	Financial advisory system		705/36			Jones; Christopher L. et al.
US 5999918 A		USPAT	19991207	48	Interactive color confidence indicators for statistical data		705/36	702/179; 702/180; 702/181; 705/35		Williams; James Benjamin et al.
US 5946667 A		USPAT	19990831	19	Data processing system and method for financial debt instruments		705/36	705/35; 705/37		Tull, Jr.; Robert Stanley et al.
US 5812987 A		USPAT	19980922	19	Investment fund management method and system with dynamic risk adjusted allocation of assets		705/36			Luskin; Donald L. et al.
US 5806048 A		USPAT	19980908	9	Open end mutual fund securitization process		705/36	705/35		Kiron; Kenneth et al.
US 5806047 A		USPAT	19980908	11	System for combined pool portfolio		705/36	705/37		Hackel; Kenneth S. et al.
US 5761442 A		USPAT	19980602	19	Predictive neural network means and method for selecting a portfolio of securities wherein each network has been trained using data relating to a corresponding security		705/36	705/35		Barr; Dean S. et al.
US 5689650 A		USPAT	19971118	33	Community reinvestment act network		705/36			McClelland; Glenn B. et al.
US 6418419 B1		USPAT	20020709	22	Automated system for conditional order transactions in securities or other items in commerce		705/37			Nieboer; Robert Scott et al.
US 6321212 B1		USPAT	20011120	81	Financial products having a demand-based, adjustable return, and trading exchange therefor		705/37	705/1; 705/35; 705/36; 705/38		Lange; Jeffrey
US 5809484 A		USPAT	19980915	23	Method and apparatus for funding education by acquiring shares of students future earnings		705/38	705/36		Mottola; Anthony J. et al.
US 5745885		USPAT	19980428	25	Data storage medium for funding education		705/38	705/36		Mottola; Anthony J. et

A					by acquiring shares of students' f					al.
US 5673402 A		USPAT	19970930	156	Computer system for producing an illustration of an investment repaying a mortgage		705/38			Ryan; Ronald D. et al.
US 5523942 A		USPAT	19960604	73	Design grid for inputting insurance and investment product information in a computer system		705/4	705/34; 715/507		Tyler; Max C. et al.
US 5875437 A		USPAT	19990223	74	System for the operation and management of one or more financial accounts through the use of a digital communication and computation system for exchange, investment and borrowing		705/40			Atkins; Charles Agee
US 5644727 A		USPAT	19970701	80	System for the operation and management of one or more financial accounts through the use of a digital communication and computation system for exchange, investment and borrowing		705/40			Atkins; Charles Agee
US 5930762 A		USPAT	19990727	39	Computer aided risk management in multiple-parameter physical systems		705/7	705/8		Masch; Vladimir A.
US 6460036 B1		USPAT	20021001	57	System and method for providing customized electronic newspapers and target advertisements		707/10	705/14; 707/2; 709/217; 725/14		Herz; Frederick S. M.
US 6606744 B1		USPAT	20030812	285	Providing collaborative installation management in a network-based supply chain environment		717/174	705/26; 717/178		Mikurak; Michael G.
US 5754938 A		USPAT	19980519	56	Pseudonymous server for system for customized electronic identification of desirable objects		725/116	705/74; 707/6; 707/9; 709/219; 713/155; 725/1; 725/129; 725/25		Herz; Frederick S. M. et al.